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THE USE OF THE CORRESPONDENCE METHOD IN ORIGINAL RESEARCH.

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This paper is neither a defense nor an advocacy of the correspondence method of conducting original research. It is an analysis of the process with a view to understanding its best use in those cases where the personal-interview method cannot be employed. This analysis is based upon the results of the experience of the Department of Agricultural Economics at the University of Wisconsin, in the use of correspondence in conducting original research studies in the field of marketing. The department has tried different types and forms of letters in gathering the same sort of data, and has tabulated the results from the standpoint of efficiency—number and reliability of answers. While the conclusions drawn may not hold true in all lines of original research, they must be applicable, generally speaking, to the field of economics.

As compared with the personal interview method of gathering data from original sources, correspondence is open to much criticism. On the whole it can safely be said that the correspondence method is unsatisfactory because of the unreliability of the data obtained in this manner. The indefiniteness and inaccuracy of answers, which in most cases are due to misinterpretation of questions, give rise to a large percentage of error. But with all its faults, its use is indispensable to the investigator in gathering certain classes of data. First hand information which pertains to a wide area or data concerning segregated districts separated by great distances can only be obtained, without the expenditure of large sums, by correspondence. There are times, therefore, when correspondence is the only agency to be considered, and the vital question is how to eliminate the errors resulting from its use.

Nature of Questions. Statisticians state the truism that questions should be few in number, very simple and easy to answer. But the problem is not solved by that formula; for

the difficulty arises on the one hand in attempting to make the questions few enough, simple enough and easy enough to answer in order that the replies may be definite and trustworthy, and on the other in embodying enough in them to cover the field desired.

One sometimes wonders whether the required simplicity can be attained in all cases. It is surprising from how many different angles a seemingly simple question will be answered. An inquiry addressed to wholesalers over the country as to the wholesale price of cheese for a certain day or week would quite likely result in data pertaining to (1) the wholesaler's selling price, some quotations including freight and some not, (2) the wholesaler's buying price with freight charges considered in some cases, (3) and moreover different answers would pertain to different kinds of cheese, while (4) some replies would refer to foreign and some to domestic varieties of the same kind. It is safe to predict that the one question would be answered in many different ways.

The results of the experience of this department in its attempt to overcome the above difficulty point to the superiority of what might be called a one-question letter. This type of letter certainly has tendencies toward simplicity in that the questions are reduced to a very few—quite often one—which allows for minute qualifications.

Another advantage in asking only one or a few questions is that it tends to overcome that antagonistic spirit encountered by so many economic investigations. Prejudice is a barrier which the economist must always be prepared to meet. Many of his problems pertain to personal matters, private business and stocks in trade, so to speak. Because of these prying propensities he is looked upon with suspicion. To ask a business man for his handling margins is little short of impertinence, to say nothing of the probability of his answer being a prejudiced one. But to ask one merchant for his buying price under certain conditions, and another merchant for his selling price under the same conditions is a different matter. Questions which are abstract and impersonal and not connected with a series of other questions will be rewarded by more and franker answers. Hence the one-question letter,

like the example below, goes a long way in overcoming that everpresent none-of-your-business attitude.

MADISON, WIS., May 2, 1914.

GENERAL GROCER CO.,
CHICAGO, ILLINOIS.

Gentlemen:

The Wisconsin Agricultural Experiment Station is making an effort to collect all the information possible on the subject of marketing. At present we are studying the marketing of cheese. If you will kindly fill in the blank below and return it to us, your coöperation will be greatly appreciated.

Yours very truly,

WISCONSIN AGRICULTURAL EXPERIMENT STATION,

Per _____

Wholesale Selling Price of Cheese, f. o. b. your station—for *last week* in March, 1914.

In cents per pound.

American.	Swiss.	Brick.	Limburger.
	Imported Domestic		

From whom do you buy your cheese?

Name of firm _____

Address _____

Use other side for remarks.

However, this type of letter has its drawbacks. If only one question is asked when the answers to five are wanted, more letters will be required than if each letter had contained all five questions.

The chief claim for the correspondence method is its cheapness, yet no method is cheap that does not give fairly correct results. Hence the questionnaire manner of securing data is not cheap unless it can be made reliable. Postage alone costs \$40 per 1,000 letters, including stamped return envelopes. Consequently, it is a loss of time and money to send out bulky, complex questionnaires which are likely to be incorrectly answered, or more often not answered at all. The greater

cost of the meager letter is offset in a large degree by a higher percentage of answers, to say nothing of the trustworthiness of the answers. The only absolute limitation on this type of questionnaire is a mailing list so meager as not to permit its division into different groups.

Verifying the Data. Any information, however secured, should be verified if possible. One means of doing this is by getting the same sort of data from different sources. For instance, take the question of middleman charges in a simple form. The producer's selling price is the same as the manufacturer's or dealer's buying price, the manufacturer's selling price is the jobber's buying price, and the jobber's selling price is the retailer's buying price. Each step affords two widely different sources for the same information. But the checking up of the retailer's selling price cannot be done in the same manner, since the consumer buys under such varying conditions that their buying price would be of little value as an index.

In such a case one must depend upon his own knowledge of the subject as to whether the answers are representative. Question the incentive toward misrepresentation. What motive would the correspondent have in misstating the facts? Answer this question by framing a letter that will reduce such a motive to a minimum. The principal idea of a few disconnected questions is to eliminate this wish to misrepresent. To ask a retailer for his selling price of a specific commodity is more apt to result in a reliable answer than if the request were accompanied by others pertaining to his business.

Data that cannot be verified by collection from different sources should be submitted to a critic who is in a position to be able to detect errors. This critic will be, generally, a man actively engaged in the field of business which is being investigated. But, on the whole, instances are rather rare in which given data cannot be verified by comparison with those from different sources.

Help the Correspondent. Avoid bulk. Letters should not only contain a very few questions, but also a very few pages—one if possible. A bulky questionnaire often looks more formidable than it really is and for that reason is thrown in the waste basket without serious consideration. A one-page

letter which can be answered on the same sheet on which it is written has a distinct advantage. (See sample letter p. 212.) Its appearance of simplicity, and ease in answering, invites immediate attention. There are no extra pages to mislay or lose. Moreover it saves asking for the name and location of the correspondent, which are quite essential in most investigations—the location especially—and which are often omitted by the correspondent even when requested. This omission is due in some cases to carelessness and in other cases to a dislike—conscious or unconscious—in having a direct connection between the information and its source. The salutation on the one-page letter which is returned with the answer, saves the investigator the trouble of asking for name and address and the correspondent the trouble of writing them. Even though they were cheerfully given, the investigator should ask no questions which he can answer himself.

But even one question may at times necessitate the use of more than one page. In such cases form blanks should be constructed in sufficient detail to allow filling in with the least possible exertion. Avoid the asking of general questions since they often involve lengthy explanations. Blanks should be so constructed as to make explanations as few as may be. It is sometimes possible for the investigator to analyze the question minutely, and so construct the blank that the answers can be given by a series of check marks.

The idea is not to require the correspondent to make one stroke of the pen that can be made for him.

Incentive to Answer. Answers to letters asking for information depend in most cases upon the good will of the one upon whom the request is made and who is not interested in the promotion of the investigation, hence feels himself under little or no obligation to answer. For this reason it is well for the investigator, if possible, to so word his questions as to shift the answering from a basis of mere accommodation to one of interest. An experience will serve as an illustration. The Department of Agricultural Economics at the University of Wisconsin made an attempt to secure information concerning the organization of Wisconsin cheese factories—whether coöperatively or privately managed—in order to construct a

map showing the location of each type. After two rather unsuccessful letters, the third was sent out to the factories to the effect that a map of the state was being constructed, showing the location of its cheese factories, and if they cared to be represented upon this map, they should "fill in the blank below immediately." The returns were gratifying.

Providing the results of the investigation are intended for free distribution, it is a good plan to offer to send a copy upon its publication to those who will indicate their desire for it in their answer. This necessitates a reply in order to put in an application for the results of the writer's work. The following is an illustration of such an incentive: "If you are interested in our work on cheese marketing we will gladly send you the bulletin immediately upon publication."

It is sometimes well to offer special inducements for replies. The following paragraph contained in a letter to Wisconsin creamerymen illustrates this point:

"In order to show our appreciation of an immediate reply we will mail you the average monthly price paid for butterfat by coöperative creameries in the state, and also the price paid by private companies, in order that you may compare them with your prices. Kindly indicate on the back of this page if you wish these figures."

The Make-up of a Circular Letter. A circular letter cannot easily be disguised, nevertheless its appearance should be that of a personal one. The expense of getting out circular letters by the use of the typewriter is prohibitive. The mimeograph process is cheaper, but its imitation of typewriting is so defective as to exclude its use except in writing to a class of people who do not readily differentiate between grades of correspondence. On the whole, the cheapness of mimeographing is offset by a decrease in replies. The better method is that of multigraphing. It costs slightly more than mimeograph work but is an exact representation of typewriting which permits the use of that machine in filling in specific salutations at the head of each letter.

Avoid the use of "Dear Sir"; or "Madam"; which may apply with equal appropriateness to the president of our country or the village blacksmith. Effective circular letters

must have an air of the personal. This requires a signature and not the use of a stamp.

To Whom to Write. The tendency is to write to those directly interested; that is, get farming information from farmers, and retailing data from merchants. But such procedure is not always best. In some cases those directly interested are the ones who should not be approached. Many people dislike to give information about their own business, but are quite willing to divulge the nature of some one else's business. A retailer will often tell of a wholesaler's methods, as he has experienced them, when he will not converse about his own business procedure.

In considering whom to approach, first enumerate the different classes who can furnish the information. Then write to those who will be least prejudiced against answering, and those who are best prepared to handle correspondence. This department has discontinued the sending of questionnaires to farmers if the information can be secured from other sources, because of the low percentage of answers. Their failure to reply is not due, in most cases, to an unwillingness to answer, but to neglect. The handling of correspondence is not included in their daily routine. Questionnaires are forgotten, misplaced, or lost. It is not an uncommon occurrence to receive answers from farmers a year after the request has been sent. Hence our policy is to write professional men concerning general agricultural matters of their communities. The banker is acquainted with practices and business methods while the postmaster also is pretty well versed on local affairs.

The Mailing List. It is a broad statement to say that no matter what the class of people with whom one wishes to correspond, there is a published mailing list of some sort or other which contains their names and addresses. It may be the city directory, the commercial club roll, the county tax list, a financial register or one of the numerous commercial gazetteers. It may be issued for individual cities, by counties, by states or for the whole United States. At least a published list of some sort is obtainable.

The problem is not in being able to secure the names of a certain class, but in choosing the ones in the class who can

furnish the desired information. For instance, a very complete wholesale grocery directory would be of little value in the investigation of wholesale prices of Swiss cheese, since only a small percentage of grocery jobbers handle this variety of cheese. A directory containing the names of all the farmers in a state would be of little use to an investigator working on dairy butter problems in that state, if only one out of every twenty farmers made dairy butter.

The most complete commercial directory is apt to be incomplete as regards the needs of a particular investigator. A state directory of retailers omits the merchant in the cross-roads town. A state directory of wholesalers designates those handling cheese, but it doesn't differentiate between the kinds of cheese. So another broad generalization can be made to the effect that no matter how complete a commercial directory may be the probabilities are that it will not suit all needs.

This brings one to the problem of making up a mailing list to suit individual requirements. An illustration will best explain the situation. Suppose an investigator who is making a study of the marketing of dairy butter. His commercial list does not contain the names of merchants located in small towns and they are the very ones who handle dairy butter. If he followed his farmer's directory he would have to write twenty letters in order to reach one farmer who made butter. As a result both lists are discarded. Since postmasters are not permitted to give out the names of their patrons, he writes to the station agents of rural towns briefly explaining his difficulty. Then when writing to the merchants whose names the agent submits, he in turn asks for the name of farmers from whom they buy their dairy butter.

Take a different situation—that in which a majority of the class do not handle the commodity in question—Swiss cheese and the wholesale grocer. In such instances it is sometimes necessary to obtain the names of the customers of those handling the commodity in its preceding stage. In order to secure a list of wholesalers handling Swiss cheese it would be necessary to obtain the names of those to whom the dealers sold. (Dealer is a technical term applied to a cheese middleman who intervenes between factory and jobber.) However, it is

a very difficult task to obtain such a list from a commercial firm. Information of that sort in the hands of competitors would be injurious, to say the least. For this reason one should not resort to this means of compiling a mailing list, unless it cannot be made up from other sources.

Knowledge of the Subject. By all means one should possess a fair knowledge of the field which his investigation covers before making out the questionnaires. This working knowledge is best gained by some field work, supported by supplementary reading. If the investigator has not the opportunity to acquaint himself with the field except by correspondence, then his proposed questions should be submitted for criticism to someone who does know the subject in question, in order that none but intelligent inquiries be included. To expose one's ignorance of a subject by asking insignificant or irrelevant questions that are matters of common knowledge to members of the trade, is to create a prejudice against the letter which forestalls reply.